

eIT PMO EDMS QUICK REFERENCE GUIDE

EDMS BASICS

WELCOME TO THE eIT PMO EDMS! EDMS can be accessed at <https://edmsp-mrmcit.amedd.army.mil>. Use this **quick reference guide** to get started with the **basics**. The **eIT PMO Website** offers additional EDMS training options: <https://eitpmo.amedd.army.mil/EDMS/training.cfm>. EDMS has an extensive **Liveline Online Help** system (located in the upper right corner of the EDMS screen) that explains how to use every feature and function in EDMS. By choosing **For this Page** on the Help menu or clicking the **Help icon (?)**, you can get help for the specific page you are viewing in EDMS. If you can't find help there, use the **Table of Contents**. For technical issues, Tier I and II helpdesk support is provided via USAMITC's Enterprise Service Desk by calling 800-872-6482 for immediate response or by email at 800USAMITC@amedd.army.mil and referencing **eIT PMO – EDMS**; or **contact us** at the **eIT PMO Mailbox** usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil. **We will be happy to help you!!!**

✓ Setting your EDMS Notifications

Notifications are used to inform the user of changes within EDMS. You can specify activities or items that you want to monitor and at what times you want to be notified via email of any changes. **If you are part of an EDMS Workflow**, it is especially important for you to set your notifications in the system to ensure task assignment notifications are sent to your email address. The link below will take you to the **eIT PMO EDMS Notifications Guide**. Located in the **"Public Area"** in EDMS, this user guide will help you set your notifications properly to receive your workflow/task assignments.
<https://edmsp-mrmcit.amedd.army.mil/liveline/liveline.exe/open/2463194>

✓ To Add a Document

1. In the upper right corner of the EDMS screen, Click **Document** on the **Add Item menu** or click **Add Document**.
2. Click the **Browse** button to navigate to the file you want to add and then **double click** the item or click the **Open** button.
3. Type a name for the Document in the **Name** field.
4. Click the **Add** button.

✓ To Open/Download a Document

1. Click the item's **Functions** icon (**drop down arrow**), choose **Open** for a **Read-Only** view of the item.
2. Optionally, click the **Download** link to download the most recent Version of the item to your desktop.

✓ To Reserve and Edit a Document

1. Click an item's **Functions** icon, and then choose **Reserve**. **Reserving an item while you are editing ensures that no one else will be able to add a Version to that item until you have "un-reserved" adding your newly edited Version.**
2. On the **Reserve** page, click the **Download** link to download the most recent Version of the item to your computer and save it for **editing**.
3. Click the **Submit** button on the **Reserve** page.

✓ To Unreserve and Upload a Document

1. Click a Reserved item's **Functions** icon, and then choose **Unreserve**.
2. On the **Unreserve** page, select the **Add New Version** check box.
3. Click the **Browse** button and navigate to the file you want to add as the latest Version; **double click** the item or click the **Open** button.
4. Click the **Submit** button.

✓ Using the Online Edit Function

The link below will take you to the **eIT PMO EDMS Edit Function User Guide**. Located in the **"Public Area"** in EDMS, this user guide will show you how you can streamline edits you will complete in less than 30 minutes. <https://edmsp-mrmcit.amedd.army.mil/liveline/liveline.exe/open/2494301>

✓ Favorites or Shortcuts

You can access frequently used items by adding them as **Favorites**. This creates a **marker** to the item, storing it in your **Favorites** folder.

1. Right-click the item which you want to create as a Favorite, and then click **Add to Favorites**.

A **Shortcut** also creates a pointer to an item, *but doesn't have to reside in your Favorites folder*—it can be created **anywhere** in EDMS.

1. Click **Shortcut** on the **Add Item** menu. On the **Add Shortcut** page, type a name for the Shortcut in the **Name** field.
2. Click the **Browse Liveline** button and navigate to the item you want to make a shortcut to and click its **Select** link. Click **Add**.
3. Or, you can click an item's **Functions** icon, and choose **Make Shortcut**.